Installing Repertoire

Congratulations! You are ready to install Repertoire. Repertoire is a software program that will allow you to view your commissions and other key components that are entered in your Back-Office Software system.

Your Broker Dealer should have sent you an email with three things:

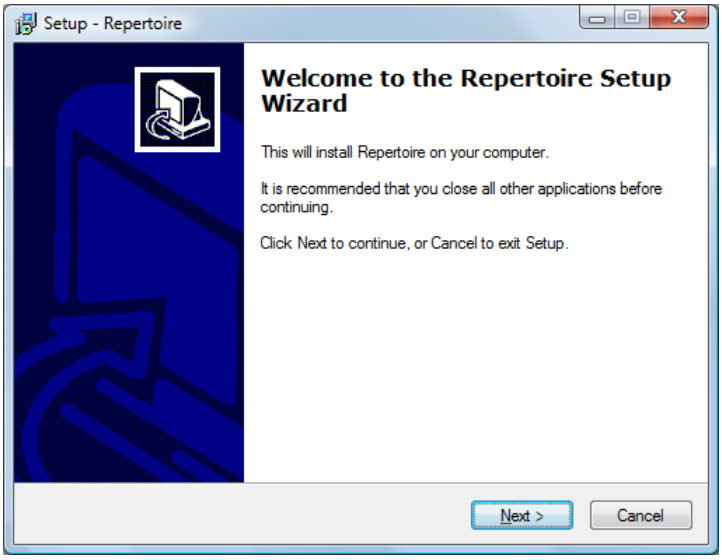
1. Your User Name (this is the same as your rep id)
2. Your temporary Password
3. A URL (address) to install the Repertoire Program

Before we can login, we need to install the program. To install it, Cut the URL below and paste it into a browser:

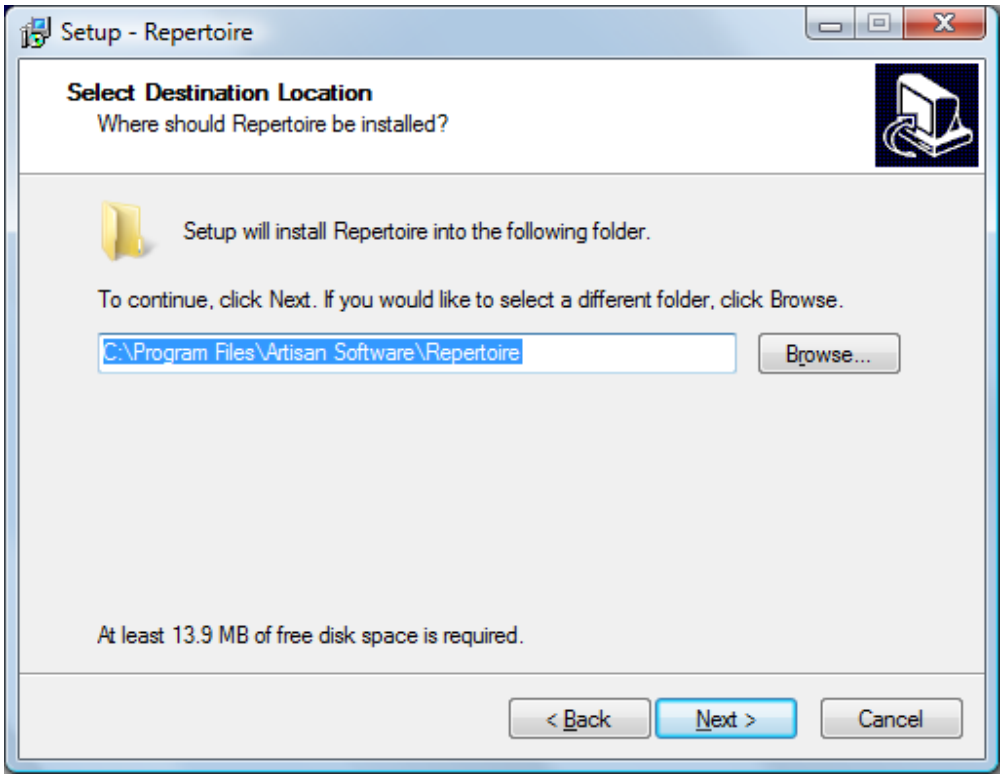
http://repertoire.artisansoftware.com:8030/Sandlapper/RepertoireSetupSandlapper.exe

You will probably get a screen that shows you that it has downloaded the program, click on the blue line to begin the process.

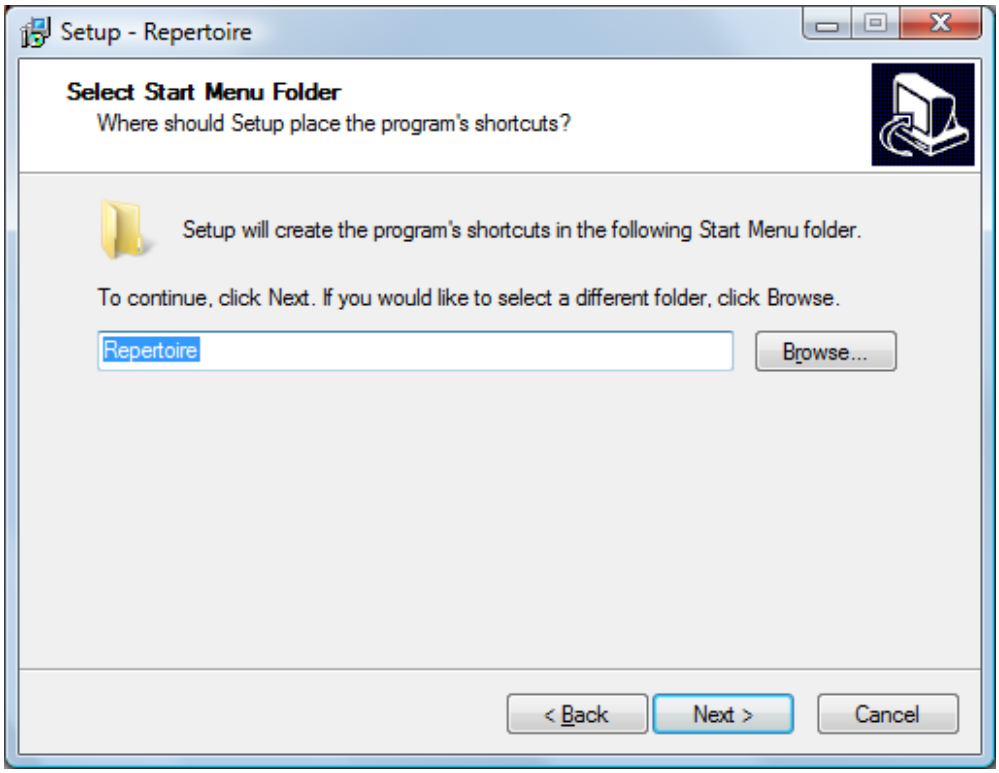
Click the Next button


Setup - Repertoire
Welcome to the Repertoire Setup Wizard
This will install Repertoire on your computer.
It is recommended that you close all other applications before continuing.
Click Next to continue, or Cancel to exit Setup.
Next >
Cancel

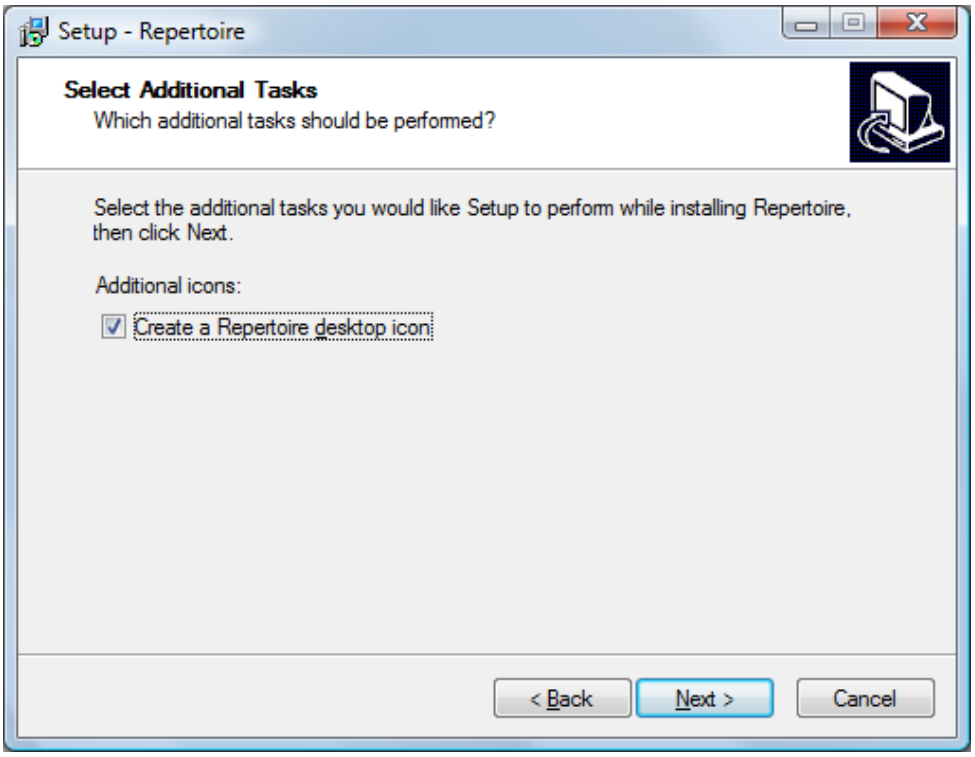
It will choose the program directory for you, click next:


Setup - Repertoire
Select Destination Location
Where should Repertoire be installed?
Setup will install Repertoire into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
C:\Program Files\Artisan Software\Repertoire
Browse...
At least 13.9 MB of free disk space is required.
< Back
Next >
Cancel

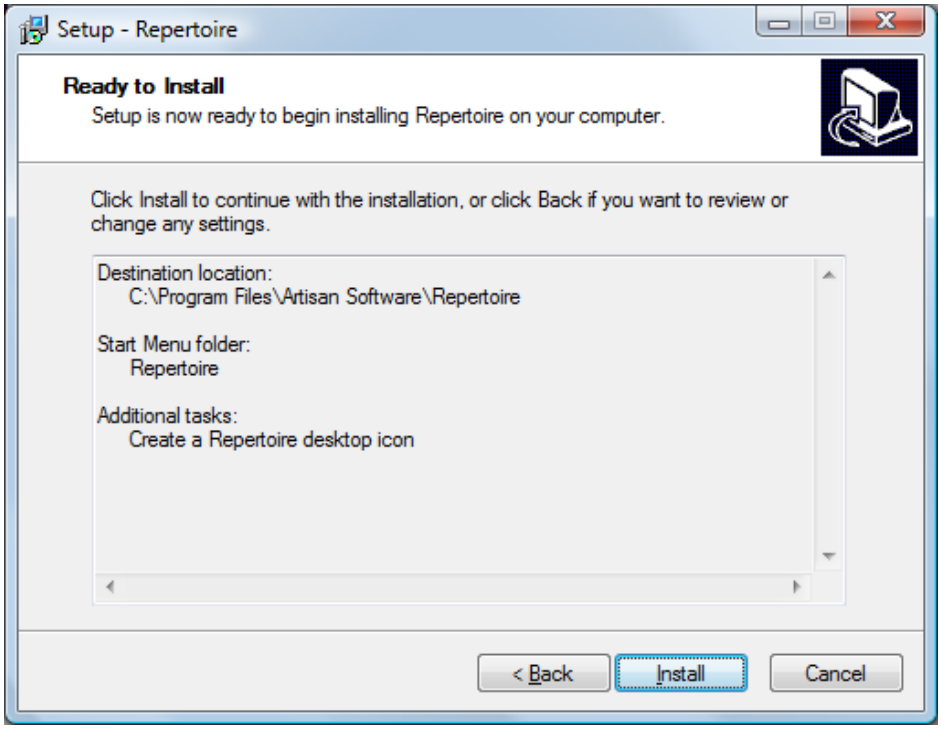
Click Next:


Setup - Repertoire
Select Start Menu Folder
Where should Setup place the program's shortcuts?
Setup will create the program's shortcuts in the following Start Menu folder.
To continue, click Next. If you would like to select a different folder, click Browse.
Repertoire
Browse...
< Back
Next >
Cancel

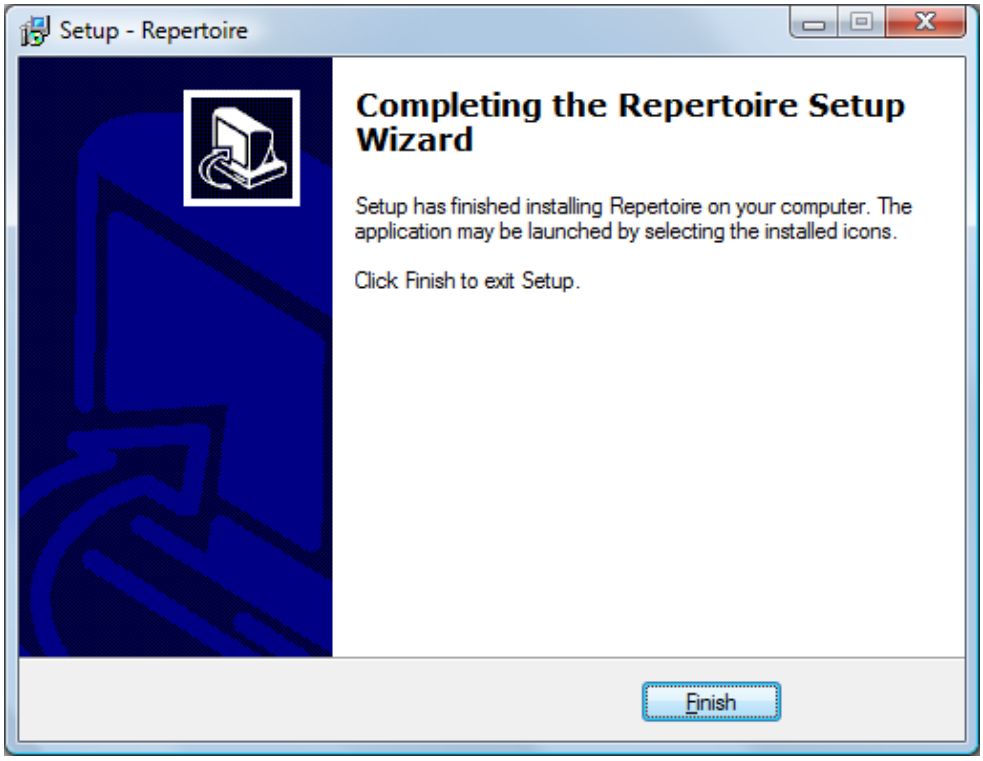
Click Next:


Setup - Repertoire
Select Additional Tasks
Which additional tasks should be performed?
Select the additional tasks you would like Setup to perform while installing Repertoire, then click Next.
Additional icons:
Create a Repertoire desktop icon
< Back
Next >
Cancel

Finally, click Install:

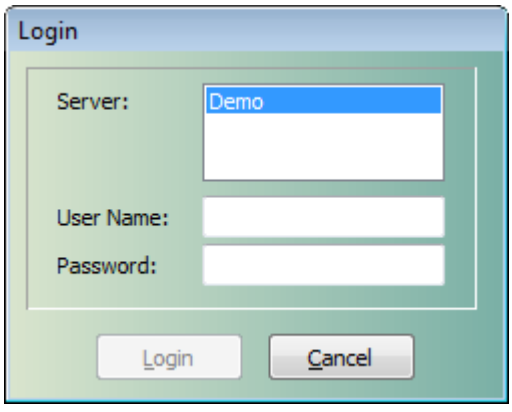

Setup - Repertoire
Ready to Install
Setup is now ready to begin installing Repertoire on your computer.
Click Install to continue with the installation, or click Back if you want to review or change any settings.
Destination location:
C:\Program Files\Artisan Software\Repertoire
Start Menu folder:
Repertoire
Additional tasks:
Create a Repertoire desktop icon
< Back
Install
Cancel

Click Finish:


Setup - Repertoire
Completing the Repertoire Setup Wizard
Setup has finished installing Repertoire on your computer. The application may be launched by selecting the installed icons.
Click Finish to exit Setup.
Finish

You should now see an Icon on your desktop, double click on the icon:

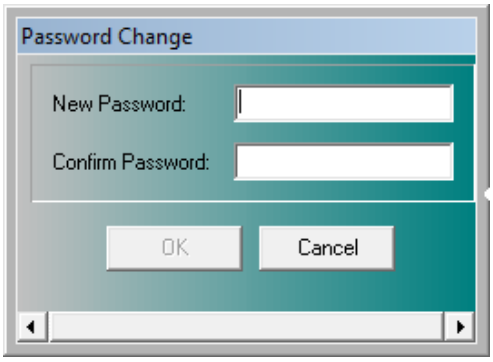
This will bring up your login window:



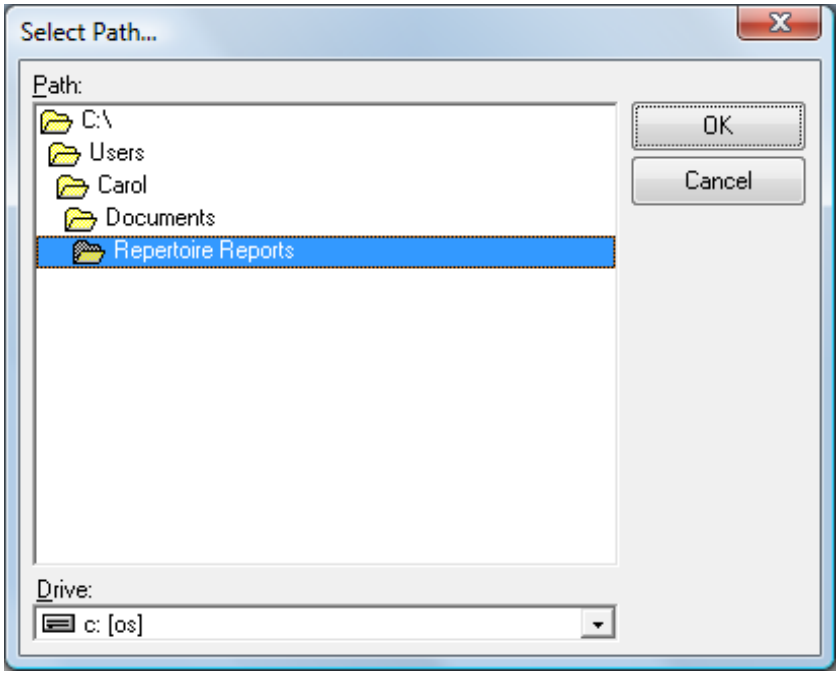
Enter your User Name - this will be your rep id.

Enter your Temporary Password. It should be welcome

The program will now ask you to change your password. This will be your permanent password. It can be letters and numbers, it will be case sensitive.

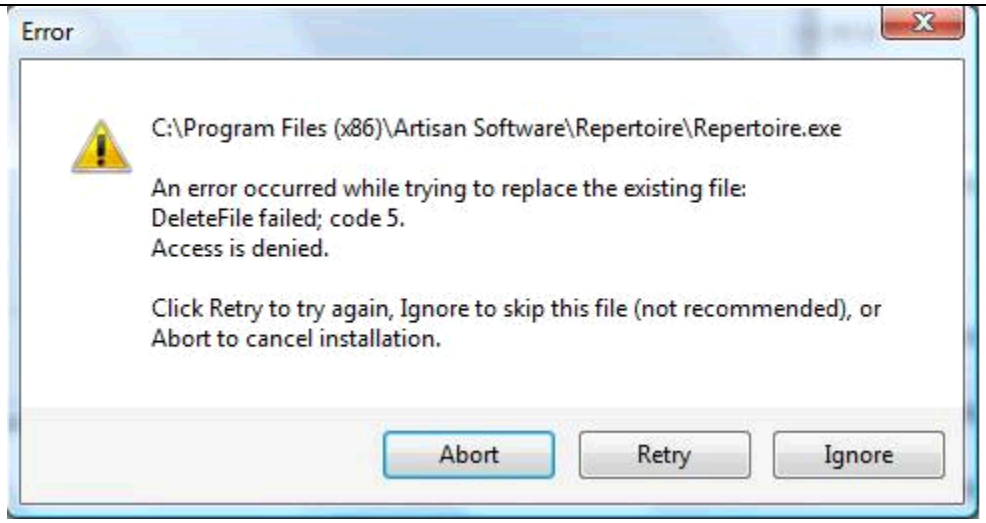


The last step is to set the report directory. When you run reports on Repertoire the system will keep a copy of the reports. It is best to install it in your "My Document" area. Note: Do NOT install it in your program directory.



You have successfully installed Repertoire!

Troubleshooting:

I can't see the entire screen as depicted in the user manual	Your font setting is not the default. Go into your control panel and change the font setting to the default.
I can't get any reports to print.	Your report directory is set to a path that you do not have permission to write to. Go into the change report directory on the left side of the screen and change your report directory to my documents.
I login and it tells me my password is not valid.	Login and Passwords are case sensitive. Your Login id is your rep number. Your password, when reset, was longer than ten characters. Enter the first ten that you set it to.
I don't see a checkmark next to the last commission cycle, so I can't print the commission statement.	The Back Office needs to release the statements.
I get this error message:	 Press the ignore button

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